



**COUNTY OF EL DORADO
Procurement & Contracts**

ATTN: Purchasing Agent
360 Fair Lane
Placerville, CA 95667

REQUEST FOR PROPOSALS #16-208-019

DUE: 3:00 PM – November 2, 2015

Sealed Proposals must be clearly marked on
the outside of the package with:

“RFP #16-208-019 MAILROOM DO NOT OPEN”

PLANNING, PERMITTING, AND PARCEL MANAGEMENT SOFTWARE

The County of El Dorado Community Development Agency (CDA), Surveyor’s Office and Assessor’s Office are seeking commercial off-the-shelf software specializing in Planning, Permitting and Parcel Management (P₃). The County intends to modify its existing processes to implement best business practices to support business functions.

The County desires to implement this system in multiple Agencies, Departments and Divisions within the County and allow external users to implement components of the system.

This request for proposal (RFP) outlines the requirements that must be met by Proposers interested in providing software and services described. Proposers shall carefully examine the entire RFP and any addenda thereto, and all related materials and data referenced in the RFP or otherwise available, and shall become fully aware of the nature and the conditions to be encountered in performing the service. **Proposers are advised to read all sections of this RFP prior to submitting a proposal.**

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1. Purpose:

The County of El Dorado Community Development Agency (CDA), Surveyor's Office and Assessor's Office are seeking commercial off-the-shelf software specializing in Planning, Permitting and Parcel Management (P₃). The County intends to modify its existing processes to implement best business practices to support business functions.

The County desires to implement this system in multiple Agencies, Departments and Divisions within the County and allow external users to implement components of the system.

2. Goals:

The goal of the new system is to provide a next-generation replacement to the Land Management Information System (LMIS) that will provide new functionality, such as:

- Automated workflows
- Document management
- Code enforcement tracking
- Project management
- Electronic plan checking
- Comprehensive cashiering functions
- Use of mobile technologies
- Automated services to the County's constituents

It will also integrate with our ESRI Geographic Information System, property system, financial system and other smaller systems.

The selected software solution must offer a wide variety of capabilities. This includes all of the areas listed in the Scope for Work and Functional Requirements sections, at a minimum.

3. Objectives:

By replacing the current software with a more robust, state-of-the-art solution, the County expects to transition to an enterprise-wide, distributed solution. In light of this, the following objectives are highly desirable outcomes of this Request for Proposal (RFP) and system replacement process:

- Support business processes with a next generation software platform for the future
- Choose a solution that is easy to implement and easy to understand, but designed for configurability
- Reduce the number of custom solutions and "shadow" systems
- Utilize vendor guidance in adapting County business practices to the out-of-the-box solution
- Utilize a robust workflow engine with capabilities for providing workflow automation and configuration, tools for enforcing data rules and business rules, and a flexible tool set to quickly respond to future Ordinance directives and business process changes
- Decrease complexity and maintenance burden through good design, use of best practices, reliance on industry standard platforms and technologies, and greater re-use of code and business rules
- Position the County to go beyond current internal limitations and provide additional capabilities, such as, interdepartmental coordination, mobile field access, electronic plan review/markup, business intelligence, and post-permit performance monitoring

- Offer a broader range of external services for public access and specifically improve offerings for mobile device access. This would include citizen capabilities such as online application and plan submission, fee payment, inspection requests, status checks, alert subscriptions, social media, etc.

4. Current User Information:

The LMIS currently has about 200 named users. The system is predominantly used by CDA, Assessor's Office and Surveyor's Office staff with a small number of users in other agencies including: 12 Fire Protection Districts, El Dorado Irrigation District, Agriculture Department, Air Quality Management District and Department of Education.

5. Current Network Configuration:

The County of El Dorado Information Technology Division has built an enterprise-class network to serve all of the unique needs of departmental customers. Since the County of El Dorado is spread over a wide geographic area, a network combining legacy telecommunications from AT&T to advanced MetroEthernet services from AT&T and Comcast has been built.

The core network infrastructure resides in Placerville, California at the County of El Dorado IT Data Center. A Cisco Nexus converged core is utilized as a backbone and provides application services on a VMWare 5.x with Equallogic SAN devices for storage options. Currently, the County of El Dorado has an 80 Mg connection with all internal internet traffic going out through that pipe. The e-mail system is hosted by Google inside the Google Cloudspace.

6. Current System Configuration:

The LMIS is a collection of databases and application platforms that link together key processes such as planning, permitting, and inspections. Many processes are manual with limited automation. The web services offered are permit status, allocation lists, parcel data, parcel permit history, building design criteria, and fire district and permit activity reports. It does not accept applications, plans or payments electronically.

LMIS was constructed over time, largely in-house. The self-built applications are based mainly on DB/2. It has developed organically to support legacy processes and business rules, some of which originated before existing California laws and modern technology. As a result, the current system is a collection of independently developed modules and functions that are made to communicate in sometimes non-standard ways. As a whole, the system does not conform to any modern information technology architectural standard and cannot be centrally administered or maintained.

Desktop workstations run Windows 7 with Internet Explorer 10, and most have dual monitor capability.

7. Scope of Work:

The County intends to acquire the most appropriate, financially attractive solution from a qualified vendor to enable it to create, manage and track permits, regulatory activities, enforcement actions, property information, etc. The County intends to purchase a proven system that is already in use and operating effectively in other jurisdictions of similar size and complexity.

A. Written Plans: The Vendor's Proposal must include the following plans:

- Project Management Strategy, Staffing Plan and Estimated Timeline
- Implementation Strategy and Plan
- Hardware Specifications
- Software Installation and Setup Plan
- Business Process Design, Gap Resolution Strategy and System Configuration Plan
- Security Strategy and Configuration Plan
- Data Conversion and Migration Plan including multiple systems and systems not being supplanted by P₃
- Web Strategy and Integration Plan
- GIS Strategy, Utilization and Integration Plan
- Application Interface and Integration Strategy and Plan
- Testing Strategy and Implementation Plan
- Training Strategy and Implementation Plan
- Go-Live and System Stabilization Plan

B. Functional Requirements: The general capabilities of the software solution chosen not only needs to replace the functionality of the current system but is also expected to offer new capabilities. The Functional Requirements Excel workbook includes fourteen (14) spreadsheets requiring codes from the table below and written responses.

To submit a question regarding any Functional Requirement, see Section 9 - Proposers' Questions. Reference the Functional Requirement spreadsheet in question, i.e., Planning, with the appropriate line number.

Code Table	
Standard	Fully Provided "Out-of-the-Box"
Configurable (no changes to underlying	If used, indicate cost or no-cost to County in Comments area
Provided in the next release	Provide estimated date of availability
Report Writer	Describe process for generating the report
Custom Modification	If used, indicate cost or no-cost to County in Comments area
Not Available	

8. Proposal Format and Required Responses:

One original document (labeled original) and one electronic version of the proposal shall be submitted in the format indicated in this section of the RFP.

In order for the County to conduct a uniform review process, all proposals must be submitted in the format set forth below. Failure to provide any of the information requested by these paragraphs is grounds for the County to reject a proposal.

Proposals should be prepared as simply as possible and provide a straightforward, concise description of the Vendor's capabilities to satisfy the requirements of the RFP. Expensive bindings, color displays, promotional material, etc., are neither necessary nor desired. Emphasis should be concentrated on accuracy, completeness, and clarity of content. All parts, pages, figures and tables should be numbered and clearly labeled.

Vendors are required to follow the outline below when preparing their proposals:

- A. Letter of Transmittal:** A letter of transmittal must be submitted with the Vendor's proposal. The letter must include the names of the persons who are authorized to make representations on behalf of the Vendor (include their titles, addresses, e-mail addresses and telephone numbers).
- B. Table of Contents:** The Table of Contents must indicate the material included in the proposal by section and page number. A proposal's table of contents should mirror this section of the County's RFP and must include all the items set forth in this section.
- C. Executive Summary:** This part of the response to the RFP should be limited to a brief narrative highlighting the Vendor's proposed solution and total cost including first year maintenance.
- D. Firm Overview and Project Manager:** Vendors must provide the following information about their company, subcontractors, project partners and Project Manager so that the County can evaluate the Vendor's stability and ability to support the commitments set forth in response to the RFP.

Software Vendor, subcontractors, and project partners, if applicable, must provide:

- Number of years in the business of providing software to the land use, permitting, plan review and parcel management industry
- Number and percentage of your clients that are in the public sector by geographic region (east coast, west coast, mid-west)
- Five (5) public sector references each, comparable to the County of El Dorado and with the proposed software running for at least six months. Installations in California or on the West Coast are preferable.

Project Manager must provide:

- Level of service (full-time, half-time, etc.) and statement guaranteeing that once the contract is signed that the Project Manager will remain on the project until completion unless the County requests replacement
- Three (3) software implementation project references that involved the proposed software, were of similar scope and complexity, and were implemented within the last five years.

Information to be provided for each reference includes: Company Name, Address, City, State, Zip, Contact Name, Title, Telephone and Email.

E. Response to Scope of Work:

The Vendor must provide narrative responses to each section of the Scope of Work. Section A, Written Plans should include in detail: timelines, resource requirements, assumptions, outcomes/deliverables, and any other applicable information.

Section B, Functional Requirements, must be submitted on the attached spreadsheet (Exhibit "A"). Blank rows or missing narrative will be scored as Not Available.

F. Database Software:

Provide a description of the database utilized by the proposed system. List any features utilized in constructing the proposed system and any additional required or optional end-user productivity tools.

G. Third-Party Products/Optional Software:

The Vendor should explicitly state the name of any third-party products that are part of the proposed solution. For each third-party product, there should be a statement about whether Vendor's contract would encompass the third-party product and/or whether the County would have to contract on its own for the product. Include length of time the Vendor has partnered with the third-party provider.

Include a description of products, features or other value added components available for use with the proposed system that have not been specifically requested in this RFP. Consideration of these products, features, or other value added components will be given where these may be of value to the County.

H. Maintenance Program:

Specify the nature of any post-implementation support provided by the Vendor including:

- Telephone support to include toll-free support hotline; hours of operation; availability of a 24 x 7 hotline etc.
- Special plans defining "levels" of customer support (e.g., gold, silver, etc.)
- Delivery method of future upgrades and product enhancements including historical frequency of upgrades by module
- Availability of user groups
- Problem reporting and resolution procedures
- Other support (e.g., on-site, remote dial-in, Website access to patches, fixes and Knowledge Base)

I. Cost Proposal:

Due to budget constraints, this project has an estimated cost of \$800,000. This estimate reflects the initial startup costs including but not limited to software, project management, system design, system configuration, data conversion, interfaces, system testing, implementation, web presence, GIS utilization, user documentation and training, as well as the first year subscription or maintenance fee.

Vendors may provide multiple cost proposals based upon the architectural design of the system i.e., on-premise, hosted or SaaS. Alternative financing and licensing options may also be proposed.

Proposals are expected to be on a "not-to-exceed" basis where the County compensates firms on the basis of hours and expenses incurred up to a ceiling amount. If there is a "residual" amount at the end of the project (difference between total implementation contract amount and actual total costs), the County

will retain the difference by simply not spending the funds. By contrast, if the proposal cost ceiling is exceeded, firms finish the work at no additional compensation, unless the County does not meet specific assumptions.

The County reserves the right to contact firms on cost and scope clarification at any time throughout the selection and negotiation processes. The County is asking firms to propose costs for all categories with the understanding that the firms may have to make assumptions. Such assumptions must be documented as part of the proposal. Failure to fully provide cost estimates is likely to lead to vendor elimination.

The Cost Proposal shall include six (6) schedules, as follows:

Schedule 1: Summary with total cost of ownership analysis for five years

Schedule 2: Licensing Fees*

Schedule 3: Annual Maintenance

Schedule 4: Professional Services

Schedule 5: Training Costs

Schedule 6: Travel and Other Costs

Note: **An explanation/definition of the basis for licensing fees must be defined (i.e. concurrent user, by site, bundled, etc.). The County reserves the right to purchase any combination of licenses at the pricing presented in any response to this RFP.*

9. Proposers' Questions

Questions regarding this RFP must be submitted in writing to the Procurement & Contracts Division and must be received no later than **3:00 p.m. – on October 14, 2015**. All envelopes or containers must be clearly labeled "**RFP #16-208-019– QUESTION**" for convenience purposes. Envelopes or containers not clearly labeled may be overlooked and not responded to.

Questions will not be accepted by telephone, facsimile (fax), electronically, or orally. The County reserves the right to decline a response to any question if, in the County's assessment, the information cannot be obtained and shared with all potential organizations in a timely manner. A summary of the questions submitted, including responses deemed relevant and appropriate by the County, will be posted on the Procurement and Contracts website on or about October 19, 2015.

**All inquiries shall be submitted by U.S. mail to:
Procurement and Contracts
360 Fair Lane
Placerville, California 95667
RFP #16-208-019– Question**

Proposers are cautioned that they are not to rely upon any oral statements that they may have obtained. Proposers shall direct all inquiries to the County RFP Contact and shall not contact any other department staff directly regarding any matter related to this Request for Proposal.

10. Proposal Submittal

Proposers must submit one (1) original, **signed** hard copy and one (1) digital copy (PDF) of their proposal in Microsoft Office format, along with any addenda, in a sealed envelope or container, clearly marked “**RFP #16-208-019– MAILROOM DO NOT OPEN**”, **no later than 3:00 PM – November 2, 2015**, to:

**County of El Dorado
Procurement and Contracts
360 Fair Lane
Placerville, CA 95667**

A Proposer may withdraw its final proposal at any time **prior** to the opening deadline date and time by submitting a written request for its withdrawal to the County Purchasing Agent, signed by an authorized agent of the firm. Proposers may thereafter submit a new or modified proposal **prior** to the opening deadline date and time. Modifications offered in any manner, oral or written, will not be considered.

Proposers submitting less than the required number of copies of their proposal will be rejected and considered “non-responsive.”

It is the responsibility of the Proposer to assure that the proposal is received in the Procurement & Contracts Division prior to the proposal opening deadline date and time. Proposals received beyond the proposal opening deadline will not be accepted and will be returned unopened. The time stamp clock located in the office of the Procurement & Contracts Division will serve as the official time clock.

11. Evaluation Process

A County Evaluation Team will review all proposals received. At decision points in the process, the Team will evaluate vendors according to specific criteria and will elevate a certain number of vendors to compete against each other. The proposals will be evaluated on the following criteria:

- Conformance with RFP guidelines and submittal requirements
- Response to Scope of Work: Written Plans and Functional Requirements
- Public Sector Experience and References
- Compatibility with the County’s current and future technology architecture, expertise, and future strategy
- Maintenance Program response
- Total Cost of Ownership
- Compatibility with the County’s desired terms and conditions
- Software Demonstrations and Interviews
- Site Visits (Optional)
- Software Discovery

The County reserves the right to determine the suitability of proposals on the basis of all of these criteria.

The County will use a competitive process based upon elevating vendors from one phase to the next until a finalist is determined. The County recognizes that if a vendor

fails to meet expectations during any part of the process, it reserves the right to proceed with the remaining vendors or to elevate a vendor that was not elevated before.

Public Sector Experience and References:

The County will contact the references for the Vendor, Subcontractor(s), Project Partner(s) and Project Manager. These references will be asked a series of questions regarding their satisfaction with the software and the performance of the implementation vendor.

Software Demonstrations and Interviews:

The County will schedule software demonstrations and interviews to assess the “look and feel” of the proposed software. Several of the other evaluation criteria may be clarified and refined, including the implementation strategy and plan, technology compatibility, ability to meet business requirements, and cost. Vendors will be required to respond in writing to any issues and questions raised by the County at the software demonstrations and interviews.

Site Visits (Optional):

The County may choose to conduct site visits. If it does so, sites will be visited only if the software is in production.

“Discovery” Sessions:

“Discovery” Sessions provide the opportunity for the County to reexamine software functionality and gather additional information on implementation and any other issues that are deemed important for the contracting process. Vendors elevated to this level will be asked to make available their system for County users to test and research system functionality directly online using existing County data. The system will be available during standard working hours and for three to five business days.

Based on the Discovery Sessions and additional information that the vendor may be asked to provide, a single vendor will be identified as the finalist for contract negotiations. If a contract cannot be reached after a period of time deemed reasonable by the County, it reserves the right to contact any of the other vendors that have submitted bids and enter into negotiations with them.

Final Contract Negotiations:

The finalist vendor will work with County staff to develop a Software License Agreement, a Statement of Work (SOW), and Implementation Services Agreement. The SOW will be attached to the Services Agreement. The Functional Requirements spreadsheets will be attached to both the Software License Agreement and the Implementation Services Agreement.

12. Public Records Act

All proposals shall become public information at the conclusion of the selection process, with the exception of those portions of a proposal that are identified at the time of submittal by the Proposer as trade secrets and/or which are deemed by the County as not being public documents that must disclosed under the Public Records Act, or other appropriate statutes and regulations. Pricing and service elements of the successful proposal will not be considered proprietary information. Proprietary information shall be submitted in a separate sealed envelope clearly labeled as proprietary with the RFP number on the outside of the envelope. All materials submitted in response to this Request for Proposal shall become the property of the County and will not be returned.

13. Valid Offer:

Proposals shall remain valid for 120 days from the due date. The County reserves the right to negotiate with the successful Proposer any additional terms or conditions not contained in their proposal which are in the best interest of the County or to otherwise revise the scope of this RFP.

This RFP does not constitute a contract nor an offer of employment. The cost of preparation of proposals shall be the obligation of the Proposer. All proposals, whether accepted or rejected, shall become the property of the County and will not be returned. Unnecessarily elaborate responses, enclosures and specialized binding are not desired, and may be construed as an indication of Proposer's lack of cost consciousness.

14. County's Rights:

The County reserves the right to:

- Request clarification of any submitted information
- Waive any informalities or irregularities in any qualification statement
- Not enter into any agreement
- Not select any consultant
- Cancel this process at any time
- Amend this process at any time
- To award more than one contract if it is in the best interest of the County
- Interview consultants prior to award
- To request additional information during an interview

15. El Dorado County Web Site Requirements

It is the bidder's responsibility to monitor the County's website for possible addenda to this bid to inform him/herself of the most current specifications, terms, and conditions, and to submit his/her bid in accordance with the original bid requirements and all addenda. All available bids and related addenda can be found at:

<http://edcapps.edcgov.us/contracts/invite.asp>

Failure of bidder to obtain this information shall not relieve him/her of the requirements contained therein. Those bidders not acknowledging and returning Addenda as required will not be considered and will be rejected as "non-responsive."

For RFP results, please visit our website at:

<http://edcapps.edcgov.us/contracts/bidresults.asp>

16. Business License Requirement

It is unlawful for any person to furnish supplies or services, or transact any kind of business in the unincorporated territory of El Dorado County without possessing a County business license unless exempt under County Code Section 5.08.070. Contact the Tax Collector's Office at 360 Fair Lane, Placerville, CA 95667, or phone (530) 621-5800, for further information. El Dorado County is an equal opportunity employer (EOE). Minorities, females, and handicapped are encouraged to participate (M/F/H).

It is not a requirement to possess a County business license at the time of proposal submittal. Successful Proposers may be required to possess a County business license to award contract. The County of El Dorado is an equal opportunity employer (EOE). Minorities, Females and Handicapped are encouraged to participate.

Your participation in the RFP process is important to the County of El Dorado!

This RFP does not constitute a contract or an offer of employment. The cost of preparation of proposals shall be the obligation of the Proposer. All proposals, whether accepted or rejected, shall become the property of the County and will not be returned. Unnecessarily elaborate responses, enclosures and specialized binding are not desired, and may be construed as an indication of Proposer's lack of cost consciousness.

EXHIBIT A - FUNCTIONAL REQUIREMENTS

		County of El Dorado - Planning, Permitting and Parcel Management System Functional Requirements													
Please input a "1" in the appropriate column to the right of the feature/function/capability statement. Further explanations, answers, or information regarding 3rd party software and/or modification costs must be provided in the Comments column. Blank rows will be scored as Not Available.															
Legend:															
Standard - Current	Available in current software release														
Standard - Configurable	Requires configuration														
Standard - Next Release	Guaranteed available in next release of software														
Report Writer	Report Writer function through Standard Reports or Ad Hoc Report Writer														
3rd-Party Application	Please estimate general cost estimates in comments not a quote, unless available due to your resell arrangement.														
Custom Modification	Custom programming by vendor (not meant to be a set-up configuration that is standard process through implementation).														
Not Available	Not available in current or next release; interfaced/integrated third-party application or through custom modification.														
Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Configurable	Standard - Next	Report Writer	3rd-Party Application	Custom Modification	Not Available	Comments or Answers					
Planning		Planning													
Planning	1.000	GENERAL													
Planning	1.001	TRACK PLAN SETS - Ability to track location of plan sets by user (planner/reviewer).													
Planning	1.002	ALERTS - Ability to <i>flag</i> entire projects or individual project conditions so as to <i>alert</i> or warn any personnel of a project or special condition.													
Planning	1.003	ALERTS - Ability to add flags as needed by County personnel for any County defined alert such: as stop work notices, permit holds, open code enforcement cases, overdue deposits, etc.													
Planning	1.004	ALERTS - Ability to add flags as needed by County personnel to any parcel (e.g., Environmental Habitat, Historical Designation Property, Fault Zone, Red tag building, wells on site, etc.)													
Planning	1.005	PROJECT DESCRIPTION - Project Description shall include the ability to enter unlimited free form text to describe the property.													
Planning		PROJECT DESCRIPTIONS - Project Descriptions shall include the ability to capture the following data, at a minimum:													

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Configurable	Standard - Next	Report Writer	3rd-Party Application	Custom Modification	Not Available	Comments or Answers
Planning	1.006	Existing and proposed use								
Planning	1.007	Number of buildings, stories, units, rooms								
Planning	1.008	Size (size of acreage, building height/square footage)								
Planning	1.009	Geographic location on the parcel								
Planning	1.010	MULTIPLE CONTACT TYPES - Ability for the County to record multiple individuals per application to include (but not limited to) Property Owner of Record, Authorized Agent (if different from Property Owner), and Applicant (if different from Property Owner), Developer, etc. Information captured to include name, address, multiple phone numbers, fax number, and e-mail address, at a minimum.								
Planning	1.011	EXTERNAL WEBSITES - Ability to select from State Contractor, Architect, Engineer and Land Surveyor websites.								
Planning	1.012	PROJECT LOOK-UP - Ability to look-up project status to determine tasks not completed by due dates.								
Planning	1.013	PLAN CHECK WORK FLOW REQUIREMENTS - Ability to set up different plan check requirements (e.g., commercial landscape development project, etc.).								
Planning	1.014	PROPERTY ZONE/DESIGNATION - Ability to set up a property zone/designation and apply zone/designation to multiple parcels at one time.								
Planning	1.015	SPECIAL CONDITIONS - Ability to note any restrictions or special conditions established by reviewing departments as a prerequisite within the permit process.								
Planning	1.016	CONDITIONS OF APPROVAL - Ability to apply project-specific conditions of approval or mitigation measures to each address or parcel within that project.								

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Configurable	Standard - Next	Report Writer	3rd-Party Application	Custom Modification	Not Available	Comments or Answers
Planning	1.017	CONDITIONS OF APPROVAL - Allow conditions of approval and mitigation measures to be entered and maintained by multiple departments.								
Planning	1.018	CHANGE COA - Ability to add, modify or delete conditions of approval during the project approval process.								
Planning	1.019	STANDARD COA - Provide a County defined table of standard or recurring conditions that can be accessed and applied to a project during project processing, thereby eliminating the need to enter repetitive "boilerplate" conditions.								
Planning	1.020	ACCUMULATE COMMENTS AND COA - Provide for electronic collection of County comments and conditions as review progresses.								
Planning	1.021	CONDITIONS OF APPROVAL - Ability to apply project-specific conditions of approval and mitigation measures to each address within that project for all future permits.								
Planning	1.022	STANDARD COA - Ability for external entities, such as Engineering, Fire, etc.to establish standard conditions of approval, standard special condition comments, and free-form comments on demand.								
Planning	1.023	PARCEL INQUIRY - Ability to tie all conditions of approval to the parcel inquiry screen								
Planning	1.024	HISTORY - Ability to show all permit history when entering application information.								
Planning	1.025	PERMIT ISSUANCE RESTRICTIONS - Provide for restriction of permit approval until conditions or restrictions have been satisfied.								
	1.026	ASSOCIATIONS - Ability to associate Special Studies, documents and attachments to a geographic location.								
Planning		PROJECT TRACKING AND ROUTING - WORKFLOW								
Planning	1.027	ASSIGNEE STATUS - Ability to track status by assigned planner.								

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Configurable	Standard - Next	Report Writer	3rd-Party Application	Custom Modification	Not Available	Comments or Answers
Planning	1.028	WORKFLOW - Need work flow capability to establish required planning process steps and prerequisite requirements.								
Planning	1.029	WORKFLOW - Provide for the user-definition of application work flow within multiple departments and to external agencies based on the type of application.								
Planning	1.030	SUB-TASKS - Ability to set up multiple plan review steps and sub-tasks.								
Planning	1.031	TRACK COMMENTS AND COMPLETIONS - Ability to monitor staff review comments and completions.								
Planning	1.032	ELECTRONIC PLAN REVIEW - Capable of online plan review with ability to markup plans and add comments.								
Planning	1.033	WORKFLOW ROUTING - Automatic routing of projects through various user-defined processes consisting of County and external agencies.								
Planning	1.034	REVIEW AND EXPIRATION DATES - Provide the ability to establish review and expiration dates for all events.								
Planning	1.035	PROJECT NUMBER CHANGE - Ability to change project number after initial application entered without losing historical data.								
Planning	1.036	SUB-PROJECTS - Ability to setup unlimited sub-projects within a single master project (e.g., multiple use projects - residential, commercial, multi-family). NOTE: Some master projects take years between workflow processes due to economic and ownership changes. Need to continue on with same overall project, but track as separate projects (e.g. General Plan Change, Annexation, Rezone, entitlement, preliminary site plan, final site plan, etc.)								
Planning		SCHEDULING								
Planning	1.037	MASTER CALENDAR - Ability to provide a master calendar with all participants included from all departments showing outstanding projects and tasks due.								

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Configurable	Standard - Next	Report Writer	3rd-Party Application	Custom Modification	Not Available	Comments or Answers
Planning	1.038	FUTURE PLANNING CALENDAR - Ability to create future project planning calendar (schedule of all future hearings/meetings by type and date).								
Planning	1.039	DATE ADJUSTMENTS - Ability to manually adjust dates/wait periods.								
Planning	1.040	AUTOMATIC RE-DATE UPON STEP COMPLETION - Provide an automatic date calculation for next step when a prerequisite review step is completed.								
Planning		FEES								
Planning	1.041	AUTO-CALCULATE FEES - Calculate standard planning fees using County-supplied criteria .								
Planning	1.042	EFFECTIVE DATES - Provide for calculation of standard fees with effective dates using County-provided formulas or tables based upon application dates.								
Planning	1.043	EFFECTIVE DATES - Provide for calculation of standard fees with effective dates using user-provided formulas or tables.								
Planning	1.044	FIXED AND VARIABLE FEES - Ability to set up fixed, minimum and variable fees.								
Planning	1.045	UNIT COST - Ability to set up flat fees per unit cost.								
Planning	1.046	PERCENTAGE FEES - Ability to calculate fees as a percentage of planning fee.								
Planning	1.047	FEES ON DEMAND - Ability to charge any or all fees by specific project requirements (e.g., create fees on demand).								
Planning	1.048	MISCELLANEOUS FEES - Ability to calculate and track unlimited miscellaneous fees collected in conjunction with project (e.g., copies).								
Planning	1.049	WAIVE FEES- Ability to waive or override default fees.								
Planning	1.050	CONSULTANT FEES - Ability to track and charge purchased fees (e.g., purchasing an Environmental Impact Report from a third-party consultant).								

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Configurable	Standard - Next	Report Writer	3rd-Party Application	Custom Modification	Not Available	Comments or Answers
Planning	1.051	FEE CHANGE NOTES - Ability to track notes for fees that are manually changed.								
Planning	1.052	DEPOSITS - Track fees, deposits/collections, receivables, balance due, and refunds.								
Planning	1.053	DEPOSIT REQUIREMENT ADJUSTMENTS - Ability to adjust deposit amounts at any time (discretionary).								
Planning	1.054	COLLECT FEES - Provide for the collection of planning fees including tracking partial payments.								
Planning	1.055	FEES BY PROJECT TYPE - Planning fees should be automated by project type.								
Planning	1.056	FEES BY TASK TYPE - Planning fees should be automated by task type.								
Planning	1.057	RESPONSIBILITY - Ability to track financially responsible party.								
Planning		LETTERS								
Planning	1.058	STANDARD NOTICES - Ability to set up "unlimited" standard notices by project, review step, hearing, etc.								
Planning	1.059	FLAG COMMENTS AND NOTES FOR INCLUSION - Ability for notices and letters to incorporate user-designated field information, comments, notes, etc.								
Planning	1.060	MEETING NOTIFICATION - Provide a method of automatically generating user-defined notifications to property owners and others regarding projects and meetings associated with these projects, based on parcel selection (i.e., Public Hearing notices).								
Planning	1.061	NOTIFICATION TRACKING - Ability for system to track and maintain all notices sent associated to each project.								
Planning	1.062	AREA/ VICINITY MAP - Automatically generate area map to accompany notice above. Cartographic capabilities								

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Configurable	Standard - Next	Report Writer	3rd-Party Application	Custom Modification	Not Available	Comments or Answers
Planning	1.063	PROPOSED CHANGE NOTIFICATION - Provide for automatic mail out notice to selected parcel owners and residents regarding proposed changes to related parcels by defined radius map, including buffer zone.								
Planning	1.064	AD HOC ADDITION OF PARCEL TO NOTIFICATION LISTS - Ability to pick discretionary, impacted parcels to add to notification lists.								
Planning		INQUIRY & REPORTS								
Planning	1.065	DEVELOPER TRACKING - Track deposits, payments, and balances by developer, not just by single project or permit.								
Planning	1.066	STAFF REPORTS - Ability to automatically generate user-defined staff reports and resolutions with the ability to edit before finalizing.								
Planning	1.067	STAFF REPORTS - Ability to setup template staff reports that will insert project conditions of approval and then allow for editing remaining report using Microsoft Office.								
Planning	1.068	PROJECT STATUS REPORTS - Ability to produce project status reports by project type, due dates, planner staff, outstanding tasks, etc..								
Planning	1.069	MEETING DOCUMENTS - Provide a function for producing summary documents for a project from the comments and conditions entered during the project review without the user having to retype these comments and/or conditions.								
Planning	1.070	MEETING DOCUMENTS - Provide a method of producing meeting documents (such as agendas) for all projects scheduled for a particular meeting and date.								
Planning	1.071	MEETING DOCUMENTS - Meeting documents should have the capability of printing all previously entered comments and/or conditions as part of the individual project reviews.								
Planning	1.072	PLANNING ACTIVITY REPORTS - Ability to report planning activity by multiple activity types (e.g., property usage, affordable units, environmental documents, project types, etc.).								

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Configurable	Standard - Next	Report Writer	3rd-Party Application	Custom Modification	Not Available	Comments or Answers
Planning		RESPONSE REQUIRED - use additional pages as necessary								
Planning	1.073	PROJECT NUMBER - What is the format for planning project numbers?								
Planning	1.074	LAND USE CLASSIFICATIONS - How many user-defined plan designation codes are available?								
Planning	1.075	APPLICATION TYPES - How many application types per project are available?								
Planning	1.076	PLAN APPLICATION - How many user-defined planning project application requirements fields are there?								
Planning	1.077	TEMPORARY ADDRESSES - What is the process for assigning temporary addresses to a parcel?								
Planning	1.078	PROPERTY ASSOCIATION - How many existing parcels can be associated with a new project?								
Planning	1.079	DATA ASSOCIATION - How are documents associated with geographic locations?								
Planning	1.080	CONFIDENTIALITY - How are confidential documents segregated from other documents so they are not viewable by public?								
Planning	1.081	CONDITIONS OF APPROVAL - Describe how the various conditions of approval and mitigation measures are managed.								
Planning	1.082	PARCEL SPLIT - Describe how information is tracked when a parcel splits, combines, is renumbered, deleted, etc.								

		County of El Dorado - Planning, Permitting and Parcel Management System Functional Requirements														
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3rd-Party Application	Please estimate general cost estimates in comments not a quote, unless available due to your resell arrangement.															
Custom Modification	Custom programming by vendor (not meant to be a set-up configuration that is standard process through implementation).															
Not Available	Not available in current or next release; interfaced/integrated third-party application or through custom modification.															
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Permitting		Building Permits														
Permitting	2.000	INTAKE														
Permitting	2.001	APPOINTMENTS - Ability to schedule customer appointment.														
Permitting	2.002	APPOINTMENTS - Ability to notify staff of scheduled customer.														
Permitting	2.003	PRE-APPLICATION - Ability for customer to pre-fill application on site prior to scheduled appointment.														
Permitting	2.004	CALL LOG - Ability to track customer calls including date, time, contact information, purpose, etc.														
Permitting	2.005	MULTIPLE CONTACTS PER PERMIT - Ability to change contact that did certain aspects of construction (e.g., who did the electrical, plumbing, etc.) any time during the process with audit trail of change.														
Permitting	2.006	SECURITY - Ability to restrict access to create temporary/permanent address entries.														
Permitting	2.007	TEMPORARY PARCEL NUMBERS - Allow assignment of pseudo or temporary parcel numbers to be used for permitting purposes until actual parcel numbers are available.														
Permitting	2.008	COMBINATION PERMITS - Ability to setup a "parent" permit with numerous "children" permits (e.g., signs, plumbing, building, electrical, mechanical, pools, etc.) with separate conditions, requirements, fees, inspections, and final approvals.														
Permitting	2.009	NOTES TYPE AND DATE STAMP - Ability to add Notes and Comments throughout the permitting process, including Type and Date Stamp.														
Permitting	2.010	PERSON/ENTITY INFORMATION - Persons entered into database should be retrievable to populate persons information on future applications.														

Not Available		Not available in current or next release; interfaced/integrated third-party application or through custom modification.											
Permitting	2.011	PERMIT STATUS TRACKING - Ability to inquire on all permits for a specific contractor(s) and view status and expiration dates.											
Permitting	2.012	PERMIT STATUS TRACKING - Ability to track the status of a permit application (e.g., open, pending, paid, issued, etc.) depending on the workflow tasks completed.											
Permitting	2.013	REQUIRED SIGNATURES - Ability to print mandatory forms during intake process.											
Permitting		FEES											
Permitting	2.014	FEE EFFECTIVE DATES - Ability to calculate standard fees with effective dates using user-provided formulas or tables.											
Permitting	2.015	FEE COLLECTION AND RECEIPTS - Track fee collections, receivables, balance due, credits and refunds.											
Permitting	2.016	REFUNDS - Track refunds by permit record, customer, address, parcel and refund type.											
Permitting	2.017	FEES - Ability to set up fixed, minimum and variable fees.											
Permitting	2.018	FLAT FEES AND UNIT COST - Ability to set up flat fees plus a per unit cost times tiered valuation.											
Permitting	2.019	AUTOMATIC FEE CALCULATION - Ability for system to calculate fees automatically based on user-defined fee structures.											
Permitting	2.020	AUTOMATIC FEE CALCULATION - Ability for system to calculate fees automatically based on geography/location.											
Permitting	2.021	AUTOMATIC DISCOUNT CALCULATION - Ability for system to calculate discounted fees automatically based on user-defined fee structures.											
Permitting	2.022	PRINT DISCOUNT - Ability to print discounted amount on customer receipt.											
Permitting	2.023	BUILDING CONSTRUCTION VALUATION - Allow for user-defined valuation calculations based on a user-defined table of construction values.											
Permitting	2.024	SQUARE FOOT CALCULATIONS - Allow user-defined square footage calculations based on a user-defined table of square footage values.											
Permitting	2.025	PERCENTAGE FEES - Ability to calculate fees as a percentage of the building permit fee.											
Permitting	2.026	FEES ON DEMAND - Ability to charge any or all fees by specific project requirements (e.g., set up fees on demand).											
Permitting	2.027	MISCELLANEOUS FEES - Ability to calculate and track unlimited miscellaneous fees NOT in conjunction with building permits (e.g., copies, AQMD rebate, etc.) at any time during the process.											
Permitting	2.028	WAIVE FEES - Ability to waive or override any standard/default fees with proper security controls.											

Not Available		Not available in current or next release; interfaced/integrated third-party application or through custom modification.											
Permitting		ROUTING											
Permitting	2.029	ADD CORRECTION ITEMS - Allow entry of plan correction items as part of plan review.											
Permitting	2.030	WORKFLOW - Ability to pre-establish workflow and task requirements by permit type (reviews, plan checks, verifications, inspections, other agency approval requirements, etc.).											
Permitting	2.031	WORKFLOW - Ability to modify workflow and task requirements as needed.											
Permitting	2.032	WORKFLOW - Ability to manage and approve hierarchies (e.g., approval paths based on item or document to be routed).											
Permitting	2.033	USER-DEFINED ROUTING - Allow user-defined plan review routing based on type of work performed by multiple users/departments (e.g., specific staff, planning, fire, engineering, etc.).											
Permitting	2.034	APPROVALS - Do not allow permit to be issued until all required plan review steps are completed.											
Permitting	2.035	ASSIGN TASKS - Ability for departments to assign tasks and re-assign to specific staff.											
Permitting	2.036	ASSIGN TASKS - Ability to either assign staff or leave task completion at the department level.											
Permitting	2.037	USER DASHBOARD - Provide a user specific dashboard with statistics and assignments.											
Permitting	2.038	PERMIT APPROVAL - Ability to email online permit approvals to applicants.											
Permitting	2.039	PERMIT APPLICATION TO INSPECTION - Ability to prompt an inspection from a permit application.											
Permitting		PROCESSING											
Permitting	2.040	CORRECTIONS LIST - Ability to generate a department specific or overall corrections list.											
Permitting	2.041	CUSTOMER CORRECTIONS LIST - Ability for system to generate a corrections list (letter) for customer.											
Permitting	2.042	PRINT PLAN CHECK COMMENT - Ability to print plan check comments on plan check review letter.											
Permitting	2.043	NOTIFICATIONS WITH ATTACHMENTS - Ability to combine standard notifications/letters/permits, certificates, etc. with pre-determined and unique attachments .											
Permitting	2.044	SPECIAL CONDITIONS - Ability to note any restrictions or special conditions established by reviewing departments as a prerequisite within the permit process.											
Permitting		PERMITTING / ISSUANCE											
Permitting	2.045	PERMIT REINSTATEMENT - Ability to relate an expired permit to a new permit.											
Permitting	2.046	ALERT - Provide an alert at Certificate of Occupancy or Permit Final if any open conditions or fees owed.											

Not Available		Not available in current or next release; interfaced/integrated third-party application or through custom modification.												
Permitting	2.047	ABILITY TO BLOCK - Allow the ability to block Certificates of Completion or Final Occupancy permit until all required sign-offs and inspections are completed.												
Permitting	2.048	PRINT NOTES ON PERMIT - Allow notes from plan review and general application to be flagged to print on the permit.												
Permitting	2.049	ASSESSOR - Ability to automatically notify the Assessor's Office of permit or certificate of occupancy issuance.												
Permitting	2.050	MANDATED - Permit must meet all State of California legal requirements.												
Permitting	2.051	PERMIT EXPIRATION - Track permit expiration date, as delineated by County ordinance.												
Permitting	2.052	PERMIT EXPIRATION - Provide a report of permits that will expire within a specified number of days, and export the information to Word mail merge to generate permit expiration letters.												
Permitting	2.053	PERMIT EXPIRATION - Ability to change the status of an expired permit.												
Permitting	2.054	PERMIT EXPIRATION - Allow the expiration date to be extended. Record the original expiration date, the modified expiration date and create an audit record identifying the user that made the change.												
Permitting		RESPONSE REQUIRED - use additional pages as necessary												
Permitting	2.055	MULTIPLE CONTACTS PER PERMIT - How many owners, agents, contractors, engineers, architects, surveyors, other contacts can be tracked per permit?												
Permitting	2.056	VALID ADDRESSES - How many ways does the system validate permit location (e.g. address, GPS coordinate, etc.)?												
Permitting	2.057	PERMIT DATA - Allow for an unlimited number of names, addresses, and phone numbers to be entered for a permit application. If limited, please explain limitation.												
Permitting	2.058	ALERTS - How many alerts does the system have (e.g., outstanding code enforcement violations, stop work order, etc.) on which fields can they be applied?												
Permitting	2.059	UNLIMITED ALERTS - How many alerts can be placed on a parcel?												
Permitting	2.060	STANDARD ROUTING - What are the criteria for automatically routing work?												
Permitting	2.061	MASTER PLANS - How are master plans processed?												
Permitting	2.062	MULTIPLE PERMITS - How does the system create a master permit and generate multiple copies for disasters or other purposes?												
Permitting	2.063	FEES AND TYPES - How many standard fees using County-provided formulas or tables are available?												
Permitting	2.064	PRINT CERTIFICATES - How many different user-defined print formats for certificates are available (different formats for different types)?												
Permitting	2.065	SCHEDULING - Describe your customer scheduling process and available tools.												

County of El Dorado - Planning, Permitting and Parcel Management System
Functional Requirements

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Inspections		INSPECTIONS								
Inspections	3.000	GENERAL								
Inspections	3.001	STOP WORK ORDER - Ability to issue stop work order (e.g., prevent other inspections, permits, etc.) on any open permit.								
Inspections	3.002	INSPECTION CONFIRMATION NUMBER - Ability to generate inspection confirmation numbers.								
Inspections	3.003	INSPECTION CONFIRMATION E-MAIL - Ability to generate confirmation e-mail to inspection requestor.								
Inspections	3.004	ATTACHMENTS - Ability to scan and/or attach files to the inspection record.								
Inspections	3.005	ALTER INSPECTION SEQUENCES - Ability to alter inspection sequences for individual permits as required.								
Inspections	3.006	INSPECTION SEQUENCE EDIT - Ability to edit inspection sequence during inspection processing to assure that inspections are being performed in the correct order as specified by this sequence.								
Inspections	3.007	SCHEDULING HOLD - Ability of the system not to allow the system to schedule an inspection if applicant has an amount due balance.								

Not Available	Not available in current or next release; interfaced/integrated third-party application or through custom modification.													
Inspections	3.008	INCOMPLETE APPROVAL SCHEDULING HOLD - Ability to restrict or hold inspection scheduling if all approvals have not been completed.												
Inspections	3.009	RE-INSPECTION FEES - Ability to manually apply a discretionary re-inspection fee.												
Inspections	3.010	BUILDING CODE - Allow sections of California and International Building Codes to be accessed during results entry.												
Inspections	3.011	INSPECTION RESULTS COMMENTS / NOTES - Allow unlimited inspection notes, free text comments or result comments to be entered during inspection results entry.												
Inspections	3.012	MOBILE PRINTING - Ability to print any documents or attachments on location.												
Inspections	3.013	PHOTO / DOCUMENT ATTACHMENT - Ability to attach photos or documents to each inspection record.												
Inspections		SCHEDULING												
Inspections	3.014	SCHEDULING - Ability for system to cut off daily inspection scheduling at "X:XX" time each day.												
Inspections	3.015	SCHEDULING WINDOW - Ability to schedule inspections for A.M. or P.M.												
Inspections	3.016	CONFIRMATION OF SCHEDULED INSPECTION - Ability to generate an e-mail, text message, or phone call confirmation of scheduled inspection window to customer.												
Inspections	3.017	ONLINE INSPECTION SCHEDULE CHECK - Allow citizens to view/check their scheduled inspection window.												
Inspections	3.018	FINAL INSPECTION APPROVAL - Ability to disallow final inspection to be scheduled if all other approvals are not completed, or without Development Services Director override.												
Inspections	3.019	FIELD INSPECTIONS - Ability to add inspections to a list that is retrievable by an inspector already in the field.												
Inspections	3.020	DRAWINGS - Ability to access approved plans and documents while on location.												
Inspections	3.021	ROUTING - Ability to route by region.												
Inspections	3.022	ROUTING - Ability to reassign inspector.												
Inspections	3.023	ROUTING - Ability to reassign a parcel to an inspector permanently.												
Inspections	3.024	MAPS - Ability to map an inspectors daily stops in GIS.												
Inspections	3.025	WORKFLOW - Processing includes sequential and parallel steps.												

Not Available	Not available in current or next release; interfaced/integrated third-party application or through custom modification.									
Inspections	3.026	WORKFLOW - System can handle simultaneous and independent inspection approvals.								
Inspections	3.027	WORKFLOW - Workflow approvals can be re-routed to secondary approver if primary approver is out or does not respond in pre-defined period of time.								
Inspections	3.028	WORKFLOW - If multiple approvals are needed at the same approval level all must approve in order for the approval process to continue.								
Inspections	3.029	WORKFLOW - Ability to issue partial approvals to allow some workflow to continue (e.g., issuance of foundation permit).								
Inspections	3.030	WORKFLOW - If user is in two roles or levels in the approval process they only need to approve once.								
Inspections	3.031	WORKFLOW - Ability to post, update, and clear building code violations found during an inspection.								
Inspections		RESPONSE REQUIRED - use additional pages as necessary								
Inspections	3.032	NOTICE OF VIOLATION - How are inspection violation notifications generated?								
Inspections	3.033	RESULTS NOTIFICATION - How is a notification of inspection results generated to specified parties?								
Inspections	3.034	INSPECTION TYPES - How many inspection types are available?								
Inspections	3.035	STANDARD COMMENTS - How many commonly used inspection comments are available?								
Inspections	3.036	STANDARD COMMENTS - How are commonly used inspection comments organized?								
Inspections	3.037	INSPECTION DAYS - How are inspections prevented from being scheduled on specific days of the week or by geographic location?								
Inspections	3.038	SCHEDULING TOOL - Describe the process for managing inspection assignments electronically with tools to help balance inspectors daily workload.								
Inspections	3.039	REAL-TIME UPDATE - How are inspectors notified of real-time updates to inspection schedules in the field and their new sequences/route?.								
Inspections	3.040	ROUTING - How does the system auto-recommend the daily route?								
Inspections	3.041	ROUTING - What are the criteria for assigning inspectors?								
Inspections	3.042	WORKFLOW - At what levels can workflow rules be set (e.g., role, position, department)?								

		County of El Dorado - Planning, Permitting and Parcel Management System Functional Requirements												
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Code Enforcement		CODE ENFORCEMENT												
Code Enforcement	4.000	GENERAL												
Code Enforcement	4.001	INTAKE FLAG - Ability to flag upon intake, if existing open Code Enforcement case(s) exist.												
Code Enforcement	4.002	CASE MERGING - Ability to merge duplicate cases already created.												
Code Enforcement	4.003	CASE ASSOCIATIONS - Ability to associate multiple complaints to a single case.												
Code Enforcement	4.004	AUTO-ASSIGN COMPLAINT - Ability to auto-assign complaint by area or type (e.g. zone 1-4, or commercial).												
Code Enforcement		CASE MANAGEMENT												
Code Enforcement	4.005	VIOLATION TYPES - Allow users to add violation types at any time.												
Code Enforcement	4.006	PRIORITIES - Allow users to add priority status to each case at any time.												
Code Enforcement	4.007	FOLLOW-UP TASK ASSIGNMENT - Ability for system to auto-assign follow-up tasks based upon assigned case officer or task type (e.g., follow-up inspections on specific dates).												

Not Available	Not available in current or next release; interfaced/integrated third-party application or through custom modification.										
Code Enforcement	4.008	CASE CHRONOLOGY - Ability to track all case chronology through narrative notes and type of action. <i>Note: All narrative notes and actions should be maintained in date/time order (latest on top).</i>									
Code Enforcement	4.009	DUE DATES - Ability for system to fill in due dates by task based upon case type.									
Code Enforcement	4.010	DUE DATES - Ability for case officer to override and edit due dates.									
Code Enforcement	4.011	NAME SEARCH - Ability to locate a case by any of the names associated with the case.									
Code Enforcement	4.012	CASE CONTACTS - Ability to track unlimited number and category of contacts per case (e.g., owners, business owner, tenant, property manager, reporting party, etc.).									
Code Enforcement	4.013	TRACKING - Ability to track complaints that do NOT result in a case.									
Code Enforcement	4.014	MULTIPLE VIOLATIONS PER CASE - Allow multiple violations to be associated with a single case.									
Code Enforcement	4.015	ACTIONS WITH EFFECTIVE DATES - Allow user to define violation related actions with effective dates.									
Code Enforcement	4.016	RESOLUTION EFFECTIVE DATES - Allow user to define number of days for resolution with effective dates by violation type.									
Code Enforcement	4.017	DISPOSITION VIOLATION - Provide capability to assign a user-defined disposition to each violation.									
Code Enforcement	4.018	PERMITTING - Provide ability to flag parcels with code violations to notify building permits system at permit application entry.									
Code Enforcement	4.019	PERMITTING - Ability to put permit process on hold if a code violation warrants such action.									
Code Enforcement	4.020	PLANNING - Ability to put a planning/entitlement project on hold if a code violation warrants such action.									
Code Enforcement	4.021	STANDARD COMMENTS - Ability to set up standard violation comments by violation type.									
Code Enforcement	4.022	UNLIMITED FREE-FORM NARRATIVE NOTES - Ability to enter unlimited, free-form notes per violation.									
Code Enforcement	4.023	UNLIMITED INSPECTION FREE-FORM TEXT - Allow unlimited free-form text at the inspection level.									

Not Available	Not available in current or next release; interfaced/integrated third-party application or through custom modification.												
Code Enforcement	4.024	LOCATION ALERTS - Ability to provide on-screen alerts when dealing with certain addresses (e.g., problem property information, hazardous materials on property, dangerous dog, etc.).											
Code Enforcement	4.025	VIOLATION NOTIFICATIONS - Provide user-defined violation notification to multiple responsible parties (e.g., owners, property manager and/or occupants).											
Code Enforcement	4.026	FOLLOW-UP INSPECTIONS - Establish user-defined follow-up workflow to ensure corrections are made.											
Code Enforcement	4.027	FOLLOW-UP PENDING ACTIONS - Provide automatic follow-up of pending actions based on date due.											
Code Enforcement	4.028	RE-INSPECTION SCHEDULING - Ability to schedule re-inspections by XX days if case not closed.											
Code Enforcement	4.029	FEES - Ability to set up fixed, minimum and variable fees.											
Code Enforcement	4.030	OVERRIDE FEES - Ability to override fees.											
Code Enforcement	4.031	DAILY FEES - Ability to assess penalties on a per day basis (e.g. \$100, \$250, \$1000) until violation is resolved.											
Code Enforcement	4.032	TRACK HISTORY - Ability to track complete case history.											
Code Enforcement	4.033	HISTORY BY PARCEL AND ADDRESS - Provide history of code violations by parcel and address.											
Code Enforcement	4.034	HISTORY BY PERSON/ENTITY - Provide code violation history by person/entity.											
Code Enforcement		RESPONSE REQUIRED - use additional pages as necessary											
Code Enforcement	4.035	PREVENT DUPLICATES - How does the system identify duplicate complaints and prevent a separate case from being opened?											
Code Enforcement	4.036	CASE STATUS - How many different status codes (i.e., new, pending, resolved, inspecting, etc.) are available?											
Code Enforcement	4.037	CASE TYPES - How many user defined case types are available?											
Code Enforcement	4.038	VIOLATION TYPES - How many violation types (vehicle, commercial site maintenance, signage, illegal vendor, overgrown vegetation, trash cans in public view, etc.) are available?											
Code Enforcement	4.039	TRACKING CRITERIA - How are case-related events tracked (by date, time, status, and code enforcement officer, etc.)?											

Not Available	Not available in current or next release; interfaced/integrated third-party application or through custom modification.						
Code Enforcement	4.040	PERMIT HOLD - How is a hold placed to prevent permit issuance without code enforcement case resolution and what are the hold criteria?					

County of El Dorado - Planning, Permitting and Parcel Management System
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Cashiering		CASHIERING								
Cashiering	5.000	GENERAL								
Cashiering	5.001	RECEIPT PRINTING - Provide the ability to print multiple receipts from any device at any time.								
Cashiering	5.002	MULTIPLE ACCOUNTS - Allow receipts to be recorded into multiple financial accounts.								
Cashiering	5.003	CASH RECEIPTS - Cash receipts should validate permit number, account number, fees, penalty amounts, and update customer balance.								
Cashiering	5.004	ACCESS TO ACCOUNT INFORMATION - Provide online inquiry access to customer account information from all integrated modules.								
Cashiering	5.005	RECEIPTS JOURNAL - Provide for the ability to print a Receipts Journal by cashier and in total. What data is printed on the Journal?								
Cashiering		FRONT COUNTER CASHIERING								
Cashiering	5.006	DATA ENTRY DEFAULT OVERRIDES - Ability to override the system-displayed default amount during receipt entry.								

Not Available	Not available in current or next release; interfaced/integrated third-party application or through custom modification.												
Cashiering	5.007	OVERRIDE G/L CODE - Ability to enter or override a default general ledger code at time of receipt.											
Cashiering	5.008	DEBIT CARD CHECK - Ability to immediately verify bank account balance for debit card payments.											
Cashiering	5.009	CHECK VERIFICATION - Provide for the ability to read ABA number from customer checks to determine cash availability.											
Cashiering	5.010	MIX RECEIPT OF TENDERS - Ability to process split or mixed tendering situations.											
Cashiering	5.011	CREDIT/DEBIT CARD SUPPORT - Ability to enter, track separately, and process simultaneously the following tendering situations: cash, check, credit/debit card, money orders and any other form of payment.											
Cashiering	5.012	TENDER ALERT - Ability to flag person/entities and addresses as cash or credit card only (no checks).											
Cashiering	5.013	PAYMENT - MULTIPLE INVOICES - Provide for a payment to be applied to multiple charges within cashiering.											
Cashiering	5.014	TIME STAMP PAYMENT TRANSACTIONS - Ability to capture the transaction time, date and user ID on each transaction.											
Cashiering	5.015	INTERNET PAYMENTS - Provide for customer payment via the Internet.											
Cashiering	5.016	INTERNET PAYMENT CHARGE - Ability to charge X% credit card charge to users utilizing online credit card payments.											
Cashiering	5.017	ATTACH FILES/DOCUMENTS - Provide the ability to attach files or documents to the receipt record.											
Cashiering	5.018	TRACKING OF TENDER TYPES - Ability to maintain the transaction and the dollar totals by the tender type.											
Cashiering	5.019	CORRECTING OF RECEIPT - Ability to correct receipts made in error.											
Cashiering	5.020	PENDING POST - Provide ability to "pending post" to all modules' customer accounts.											
Cashiering	5.021	FINAL POST - Provide ability to modify a "pending post" to permanently post customer account information.											
Cashiering	5.022	PERSON/ENTITY - Ability to maintain cash receipt history by person/entity and address, including notes.											
Cashiering	5.023	ADDITIONAL DEPOSITS - Ability for the County to take additional deposits during the entire planning application process and track project balance (i.e. fees due or credit balance).											

Not Available	Not available in current or next release; interfaced/integrated third-party application or through custom modification.									
Cashiering	5.024	DEPOSIT TRACKING - Ability to record and track deposits received and date of receipt.								
Cashiering		RESPONSE REQUIRED - use additional pages as necessary								
Cashiering	5.025	QUOTES - How are quotes calculated and managed?								
Cashiering	5.026	RECEIPT TYPES - How many different types of receipts are available?								
Cashiering	5.027	CHARGE TYPES - How many different charge types are available (e.g., permit, NSF, etc.)?								
Cashiering	5.028	PAYMENT CODES - How many payment types are available?								
Cashiering	5.029	RECEIPT PRINTING - What data is printed on the receipt?								
Cashiering	5.030	ACCOUNT CREDIT - How are customer accounts who have a credit balance handled?								
Cashiering	5.031	VOID - How is a tender transaction voided?								
Cashiering	5.032	REFUND - How is a tender refund processed?								
Cashiering	5.033	NON-MONIES - How are non-money transactions, such as, rebates or waivers processed?								
Cashiering	5.034	RECEIPTS - How many receipts can be applied to a project or permit?								
Cashiering	5.035	END OF DAY PROCESSING - Does the system require end-of-day processing to close the day's business? Please describe.								

County of El Dorado - Planning, Permitting and Parcel Management System
Functional Requirements

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3rd-Party Application	Please estimate general cost estimates in comments not a quote, unless available due to your resell arrangement.												
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Not Available	Not available in current or next release; interfaced/integrated third-party application or through custom modification.												

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Configurable	Standard - Next	Report Writer	3rd-Party Application	Custom Modification	Not Available	Comments or Answers
Parcel/Address Management		PARCEL/ADDRESSING MANAGEMENT								
Parcel/Address Management	6.000	GENERAL								
Parcel/Address Management	6.001	PARCEL AND LOCATIONS - Ability to track and relate all location information (e.g., parcel numbers, addresses, and locations with or without addresses/parcel numbers).								
Parcel/Address Management	6.002	NON-ADDRESS LOCATIONS - Ability to setup location identifications for parcels without addresses (vacant lots, intersections, road sections, easements without addresses, HOA lots without addresses, etc.).								
Parcel/Address Management	6.003	ADDRESS SELECTION - Ability to select valid address and street name to ensure consistent data entry.								
Parcel/Address Management	6.004	CHANGE ADDRESS ACCESS - Ability to restrict address and parcel number field changes to specific users.								
Parcel/Address Management	6.005	MULTIPLE PARCELS PER ADDRESSES - Provide for multiple parcels per address.								
Parcel/Address Management	6.006	MULTIPLE ADDRESSES PER PARCEL - Provide for multiple addresses per parcel.								

Not Available	Not available in current or next release; interfaced/integrated third-party application or through custom modification.									
Parcel/Address Management	6.007	MULTIPLE PARCELS WITH BOUNDARIES - Provide for user definition of parcels within multiple specific boundaries (i.e., fire districts, School District, etc.).								
Parcel/Address Management	6.008	ZONING INFORMATION - Provide for the inclusion of multiple pieces of zoning information and zoning designation by parcel.								
Parcel/Address Management	6.009	GENERAL PLAN INFORMATION - Ability to include multiple land use designations per parcel.								
Parcel/Address Management	6.010	X-Y-Z COORDINATES BY PARCEL - Ability to utilize X-Y-Z coordinates by parcel.								
Parcel/Address Management	6.011	LEGAL PARCEL INFORMATION - Provide for the inclusion of legal description for each parcel and address.								
Parcel/Address Management	6.012	TRACK ADDRESS HISTORY - Provide for tracking address history, including effective dates and explanation of changes.								
Parcel/Address Management	6.013	TRACK PARCEL HISTORY - Provide for tracking parcel history, including effective dates and explanation of changes.								
Parcel/Address Management	6.014	TRACKING OF PARCEL SPLIT OR CONSOLIDATIONS - Facilitate the tracking of split, consolidated or deleted parcels with effective dates.								
Parcel/Address Management	6.015	TRACKING OF PARCEL SPLIT OR CONSOLIDATIONS - Ability to track genealogy of parcels and history of parcel splits or parcel consolidations.								
Parcel/Address Management	6.016	ADDRESS GENEALOGY - Ability to maintain genealogy of an address and its history.								
Parcel/Address Management	6.017	MAP DISPLAY - Ability to select and display parcel data on a map. Provide capability to do spatial updates and analysis.								
Parcel/Address Management	6.018	MAP DISPLAY - Ability to create vicinity notification maps (e.g., 500 ft. buffers) and export selected data to any format.								
Parcel/Address Management	6.019	PROPERTY CONTACTS - Ability to maintain multiple property contact types with related field data (e.g., name, address, etc., for owners, HOAs, authorized agents, tenants, etc.).								
Parcel/Address Management	6.020	HISTORICAL OWNER INFORMATION - Access to historical ownership information with effective dates from Assessor's system.								
Parcel/Address Management	6.021	PROPERTY ALERTS - Ability for system to alert users that a property is in special zones when viewing property information (e.g., flood plain, liquefaction, high-fire zones, earthquake faults, redevelopment areas, special housing, specific plan areas, etc.).								

Not Available	Not available in current or next release; interfaced/integrated third-party application or through custom modification.											
Parcel/Address Management	6.022	PARCEL ALERTS TO OTHER MODULES - Ability for customer defined parcel alerts to popup or display in other land management modules (e.g., open code enforcement case, flood zone, environmental sensitive property, deed restrictions, etc.										
Parcel/Address Management	6.023	INACTIVE - Ability to flag parcels as inactive and create new parcel records from Assessor's data.										
Parcel/Address Management	6.024	INACTIVE - Ability for staff to move data, including permits/activities, to new parcels from inactive parcels.										
Parcel/Address Management	6.025	PARCEL SPLITS - Ability to track Assessor parcel splits and combines. System must allow attaching multiple parcels, addresses and people to permits and actions.										
Parcel/Address Management		RESPONSE REQUIRED - use additional pages as necessary										
Parcel/Address Management	6.026	SITE USE CODES - How many Land Use Codes are available?										
Parcel/Address Management	6.027	MULTIPLE ADDRESSES PER PARCEL - How many addresses are allowed per parcel?										
Parcel/Address Management	6.028	HISTORICAL TENANT INFORMATION - How is historical tenant information handled?										
Parcel/Address Management	6.029	GIS - How is APN and GIS data integrated?										

County of El Dorado - Planning, Permitting and Parcel Management System
Functional Requirements

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Time		TIME TRACKING & REPORTING								
Time	7.000	GENERAL								
Time	7.001	BILLABLE TIME - Ability to track time by project, task, date, staff, etc., in order to generate hourly fees (i.e., \$XX per hour).								
Time	7.002	BILLABLE TIME - Ability to track and calculate different hourly rates by specific staff (i.e., base pay, taxes and benefits).								
Time	7.003	MILEAGE - Ability to track mileage.								
Time	7.004	LABOR - Ability to track employee labor effort, employee assignment and utilization.								
Time	7.005	LABOR - Ability to report employee resource utilization.								

Time	7.006	LABOR - Ability to track employee performance to goals/assigned tasks.									
Time	7.007	TIME TRACKING - Ability to create unlimited user-defined task/activity codes.									
Time	7.008	TIME TRACKING - Ability to set task/activity codes to billable/non-billable time.									
Time		TIME TRACKING - Ability to track time by user by:									
Time	7.009	Task not related to a project or permit									
Time	7.010	Task related to a project									
Time	7.011	Task related to a permit									
Time		TIME TRACKING - Ability to enter tracked time to include:									
Time	7.012	Time spent by employee									
Time	7.013	Time out to client									
Time	7.014	Project/Permit/Task									
Time	7.015	User-defined activity codes									
Time	7.016	Notes - Area for manual entry of notes/ comments									
Time	7.017	TIME TRACKING REPORTING - Ability to query all time tracking field data for reporting purposes.									
Time		TIME TRACKING REPORTING - Ability to query reports by:									
Time	7.018	Overhead task									
Time	7.019	Project/Permit/Task									
Time	7.020	User/Employee									
Time	7.021	Time/Date Range									
Time	7.022	By Billable/Non-Billable Hours									
Time	7.023	By Interchangeable selection of all time tracking field data									
Time	7.024	PLAN PROCESS TRACKING - Ability to track planning process time, excluding times waiting on developers/owners									
Time		RESPONSE REQUIRED - use additional pages as necessary									

Time	7.025	BUDGET TO ACTUAL - Describe how to track and report budget to actuals.								
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		County of El Dorado - Planning, Permitting and Parcel Management System Functional Requirements													
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Reporting		REPORTING													
Reporting	8.000	GENERAL FEATURES													
Reporting	8.001	REPORT WRITER PERFORMANCE - Ability to process report writer requests at any time throughout the processing day without impacting system performance.													
Reporting	8.002	REPORT WRITER PERFORMANCE - Ability to export any and all data.													
Reporting	8.003	REPORT WRITER OPERATIONS - Ability to support menu-driven report options.													
Reporting	8.004	REPORT WRITER OPERATIONS - Ability to generate error messages with a description of corrective actions.													
Reporting	8.005	REPORT RETENTION - Ability to save and maintain report specifications for periodic use.													
Reporting	8.006	REPORT PROMPTING ON REGULAR SCHEDULED REPORTS - Ability to enter report prompts for reports identified as regular production.													
Reporting	8.007	REPORT SORTING AND TOTALING OPTIONS - Ability to choose various sorting options and report totaling options with appropriate sub-totaling based on selected sort option.													

Not Available	Not available in current or next release; interfaced/integrated third-party application or through custom modification.												
Reporting	8.008	REPORT SELECTION OPTIONS - Ability to query on any element including the type of transaction and the process that originated the transaction.											
Reporting	8.009	REPORT FILE SELECTION OPTIONS - Ability to report on any user defined field.											
Reporting	8.010	REPORT FILE SELECTION OPTIONS - Ability to select specific fields to be displayed on the report.											
Reporting	8.011	REPORT FILE REFRESHING - Ability to store and recall items whose values are derived from other values.											
Reporting	8.012	REPORT COLUMN DEFINITION - Ability to support default or special column headings.											
Reporting	8.013	REPORT EDIT WORD DEFINITION - Ability to support unique field editing (currency, symbol, commas, decimal places, etc.) on specific data items.											
Reporting		FUNCTIONS											
Reporting	8.014	REPORT CONDITIONING OPTIONS - Ability to support all query logic and condition statements.											
Reporting	8.015	REPORT ARITHMETIC OPTIONS - Ability to support all arithmetic calculations and statistical functions.											
Reporting	8.016	APPEND FIELD VALUES - Ability to concatenate data or field values to an existing field.											
Reporting	8.017	USER DEFINED TEMPLATES - Allow user to define formats for correspondence, notifications, letters, etc.											
Reporting	8.018	USER DEFINED TEMPLATES - Allow user to use templates or forms created in another tool, such as the Microsoft Office.											
Reporting	8.019	USER-DEFINED LAYOUT - Allow user to print in any user-defined form layout (e.g. door hangers).											
Reporting	8.020	ELECTRONICALLY FILE REPORTS - Ability to electronically file reports for subsequent user access.											
Reporting	8.021	ELECTRONICALLY FILE REPORTS - Ability to notify users that scheduled reports have been run and are available for electronic access.											
Reporting	8.022	REPORT SCHEDULING AND DISTRIBUTION - Provide report scheduling with email distribution for recipients.											
Reporting	8.023	OUTPUT QUEUES - Ability for printed output to be queued to any of the system or network printers.											
Reporting	8.024	DISPLAY PRINTER QUEUES PRIOR TO PRINTING - View or print reports, as an option.											

Not Available	Not available in current or next release: interfaced/integrated third-party application or through custom modification.												
Reporting	8.025	REPORT IDENTIFICATIONS - All reports should contain organization name, report title, column heading descriptions, processing date, sequentially numbered pages, and subtotals at each level break as appropriate.											
Reporting	8.026	FOLDERS - Ability to save reports in user-defined folders or on the desktop.											
Reporting	8.027	SAVE REPORT SETTINGS - Ability to save report settings as a specific report name attached to a user-defined report menu.											
Reporting	8.028	PUBLISH REPORTS ON WEBSITE - Ability to publish reports to website (e.g., monthly list of permits issued).											
Reporting	8.029	WEBSITE SEARCH - Via Client Portal, ability to search and generate reports.											
Reporting	8.030	REPORT OUTPUT SELECTION - Ability to support user specification of the output media or file type (printer, screen, website, PDF, etc.).											
Reporting		REPORTS											
Reporting	8.031	NOTIFICATION - Ability to flag parcels and attach activities when staff or client wish to be notified of a proposed project on that parcel.											
Reporting	8.032	DISASTER - Ability to track and report on properties that are impacted by natural disasters, with dynamic links to GIS mapping and damage assessments.											
Reporting		AUDIT REPORTS											
Reporting	8.033	AUDIT TRAIL OF CORRECTED RECEIPTS - Ability to produce a full audit trail of data entry error corrections.											
Reporting	8.034	RECONCILIATION - MONIES RECEIVED FROM CASHIERS - Provide reports for reconciliation of monies collected by cashiers.											
Reporting	8.035	BALANCING REPORT - Provide for a report to assist with bank reconciliation and generate a bank deposit.											
Reporting	8.036	REVENUE EXPENSE REPORT - Ability to generate revenue/expense report for a designated timeframe.											
Reporting	8.037	PERMIT FEE REPORT - Provides permit fee reports of daily receipts by location.											
Reporting	8.038	AUDIT - Report of all changes to file (changed from, date/time stamp, user that changed record).											
Reporting		RESPONSE REQUIRED - use additional pages as necessary											
Reporting	8.039	REPORT PROMPTING - Ability to display clear, concise report prompts, with sort and extraction selection options. Describe standard approach.											
Reporting	8.040	LETTER MERGE - Describe how to set up a template in Microsoft Office and merge with data from the system.											

Not Available		Not available in current or next release; interfaced/integrated third-party application or through custom modification.							
Reporting	8.041	CONFIDENTIAL - Provide a list of standard confidentiality reports.							
Reporting	8.042	STANDARD REPORTS - Provide a list of standard reports.							
Reporting	8.043	EXPORTING - What are the different formats available for extracting data (e.g. Word, Excel, .pdf, etc.)?							

County of El Dorado - Planning, Permitting and Parcel Management System
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General System		GENERAL SYSTEM								
General System	9.000	GENERAL SYSTEM								
General System	9.001	MULTI-USER ENVIRONMENTS - Ability to prevent any records from being deleted.								
General System	9.002	ACCESS - Ability for County employees to remotely access the system using web browser, mobile technology, tablet or other internet technology, with security access controls.								
General System	9.003	EMAIL INTEGRATION - Sending emails from system utilizing standard SMTP protocols with the ability to configure email by individual user.								
General System	9.004	MOBILE ACCESS - Ability to use mobile computers in the field with real-time access or offline.								
General System	9.005	WIRELESS PRINTING - Ability to print, on location, from wireless printers.								
General System	9.006	PRINT ATTACHMENTS - Ability to automatically print attached documents.								
General System	9.007	MOBILE PHOTO / DOCUMENT ATTACHING - Allow staff in the field to attach photos and documents to an inspection record in real-time using a laptop or other device such as smartphone or tablet.								

Not Available	Not available in current or next release; interfaced/integrated third-party application or through custom modification.												
General System		FEATURES											
General System	9.008	COMPLIANCE - Compliance with Section 508 of the Rehabilitation Act of 1973, as amended (29 U.S.C. 794d), Subpart B, 1194.22 for all public web-based applications.											
General System	9.009	COMMON PARCEL/ADDRESS INFORMATION TO ALL APPLICATIONS - Ability to provide parcel/address information across all modules.											
General System	9.010	ATTACH PHOTOS, IMAGES, DRAWINGS, DOCUMENTS TO PARCEL - Provide capability to attach photos, images of final plan drawings, documents, etc., to a parcel, permit or project record.											
General System	9.011	CODES - Ability to add/change/delete any code, status, flag, etc. fields used to classify information.											
General System	9.012	CODES - All code, status, flag, etc. fields used to classify data must be in a selection type of field.											
General System	9.013	USER-DEFINED FIELDS - Ability to make user defined fields mandatory.											
General System	9.014	FINAL EDITS - Ability to perform editing prior to printing notices/letters, etc..											
General System	9.015	NOTIFICATION METHODS - Notification methods will include, at a minimum: fax, text, email, website updates and hard copy.											
General System	9.016	ACCESSIBILITY - System is accessible by web-based browser interface.											
General System	9.017	VALIDATION - System allows complete validation and editing of data at the point of entry.											
General System	9.018	VALIDATION - Required fields cannot be bypassed.											
General System	9.019	FORMS - User defined forms can be developed to automate repetitive tasks.											
General System	9.020	ORGANIZATION - Able to drag and drop files into folders.											
General System	9.021	HELP - System should provide context-sensitive help throughout the system. Access to help should not interrupt the user if in the middle of a task.											
General System	9.022	HELP - Help text must be able to be customized by a system administrator. Any customized help text must be able to be easily imported to a new version of the system after an upgrade.											
General System	9.023	HELP - Provide an online knowledge base to assist users with application use.											
General System	9.024	REPORT WRITER DATA DICTIONARY IDENTIFICATION - Capability to reference specific data items by field descriptive name (i.e., data dictionary field names and user-screen field names are the same).											

Not Available	Not available in current or next release; interfaced/integrated third-party application or through custom modification.												
General System	9.025	NAVIGATION - System allows users to drill down into more detailed information											
General System	9.026	DIGITAL SIGNATURES - System allows for digital signature technology and proper authentication procedures.											
General System	9.027	DATE AND TIME STAMP NARRATIVE NOTES - Ability to date and time stamp each set of notes including user/username.											
General System		VIEW - Dashboard must be:											
General System	9.028	Available upon log in (home-screen)											
General System	9.029	Customized to role or user											
General System	9.030	Users have the ability to edit and save their own search parameters											
General System	9.031	Custom widgets (Favorites/Graphs/Lists)											
General System		FUNCTIONS											
General System	9.032	DOWNLOAD APPLICATION DATA THROUGH DESKTOP APPLICATIONS - Download to or access application data through desktop productivity tools such as spreadsheets, word processors, or report writers.											
General System	9.033	FORMATTING - Spell check applied to County identified fields.											
General System	9.034	FORMATTING - Text wrapping.											
General System	9.035	FORMATTING - Ability to "copy & paste" data into another field.											
General System	9.036	FORMATTING - Ability to "copy & paste" data into an external document.											
General System	9.037	TEMPLATES - Ability to achieve enhanced copying of permit/activities from master/template or other permits to allow staff to select which information is carried from one permit/activity to another. Copying must be customizable by permit type.											
General System	9.038	ATTACHMENTS - System allows users to attach documents and/or files to projects, permits, parcels, records, pages, fields, etc.											
General System	9.039	ATTACHMENTS - System allows attachment of documents in all modules and formats (e.g., pdf, jpeg, Excel, Word, etc.)											
General System	9.040	ATTACHMENTS - Attachment of documents and notes has security capabilities (e.g., person B cannot delete an attachment that person A added)											
General System	9.041	ATTACHMENTS - Ability to add hyperlinks to documents or files.											
General System	9.042	COMBINING FIELDS - Ability to combine fields in a single search (e.g., search by last name in owner field and contractor field).											

Not Available	Not available in current or next release; interfaced/integrated third-party application or through custom modification.												
General System	9.043	EMAIL - Ability to generate email from within the application to parties included on the application or to other contacts, and to view the associated email correspondence from within the application.											
General System		RESPONSE REQUIRED - use additional pages as necessary											
General System	9.044	PCI COMPLIANCE - Application is subject to the payment card information data security standard (PCI-DSS). If not, please describe how payment card transactions are handled and what information is stored to allow reconciliation of payment card transactions.											
General System	9.045	PCI COMPLIANCE - Application has been certified as meeting the Payment Application Data Security Standard (PA-DSS) by a Payment Application Qualified Security Assessor (PA-QSA). If not, please state when the vendor expects certification to be completed.											
General System	9.046	USER-DEFINED FIELDS - How many user defined fields are available?											
General System	9.047	USER-DEFINED FIELDS - Where are user defined fields located?											
General System	9.048	SEARCH - How is data retrieved using a combination of fields?											
General System	9.049	SEARCH - What techniques are available for narrowing a search (e.g., fuzzy logic, Soundex, etc.)?											
General System	9.050	SEARCH - How is data retrieved using partial word searches?											
General System	9.051	COMMENTS AND NOTES - Describe where comment and note fields can be located.											
General System	9.052	REPORTS - Provide a list of dashboard reports for operations and management											
General System	9.053	DICTIONARY - Describe how the data dictionary is maintained and migrated to newer software versions.											
General System	9.054	CHANGE CONTROL OF IMPORTED PARCEL INFORMATION - Describe how change control for updates from the County Assessor and GIS Databases will be maintained.											
General System	9.055	DOCUMENT MANAGEMENT - Describe the electronic document management process.											
General System	9.056	SCREENS - How much customization of screens is available?											
General System	9.057	EXPIRATION DATES - Describe how expiration dates are handled and list all that are available.											

**County of El Dorado - Planning, Permitting and Parcel Management System
Functional Requirements**

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Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Configurable	Standard - Next	Report Writer	3rd-Party Application	Custom Modification	Not Available	Comments or Answers
Citizen Portal		CITIZEN PORTAL								
Portal	10.000	General								
Portal	10.001	ACCESS - Ability to apply for permits, but require County verification before actual issuance.								
Portal	10.002	ACCESS - Ability to submit multiple documents, in any format, with or without an online permit application, project, code enforcement case, etc.								
Portal	10.003	ACCESS - Ability to view status of permit applications.								
Portal	10.004	ACCESS - Ability to view permit history.								
Portal	10.005	ACCESS - Ability to view status of inspections.								
Portal	10.006	ACCESS - Allow for Citizens to submit violation complaints via Internet.								
Portal	10.007	ACCESS - Allow all complaints to be entered but if outside the County's jurisdiction, ability to forward to appropriate authority.								

Portal	10.008	ACCESS - Information is posted in real-time.											
Portal	10.009	ACCESS - Ability to reply to public general information requests.											
Portal	10.010	ACCESS - Restrict download/copy of select online information.											
Portal	10.011	ACCESS - Ability to access client portal through a mobile web browser.											
Portal	10.012	ACCESS - Ability to access client portal through a mobile application.											
Portal	10.013	DETAIL - Ability to drill-down on selected spatial data.											
Portal	10.014	PROPERTY TYPE ALERTS - Ability for system to alert users that a property is in special zones when viewing property information (e.g., flood plain, liquefaction, high-fire zones, earthquake faults, redevelopment areas, special housing, special plan areas, etc.).											
Portal	10.015	DISCLAIMER - Ability to display code section 09.02.70 Confidentiality Statement or any other disclaimer on applicable screens and reports.											
Portal	10.016	ENCRYPTION - All data transmitted online must be encrypted and/or secured at the industry standard level.											
Portal	10.017	COMPLIANCE - Compliance with Section 508 of the Rehabilitation Act of 1973, as amended (29 U.S.C. 794d), Subpart B, 1194.22 for all public web-based applications.											
Portal		RESPONSE REQUIRED - use additional pages as necessary											
Portal	10.018	NOTIFICATION - Describe your client notification process.											
Portal	10.019	PAYMENT - Describe the client experience for paying fees online.											
Portal	10.020	ACCESS - Describe the client experience for setting up a log-in account.											
Portal	10.021	REPORTS - Describe the client process for generating ad hoc reports.											
Portal	10.022	MONITORING - Describe how the client can monitor the progress of their permit, project, code enforcement action, request, etc.											
Portal	10.023	ACCESS - Ability to book inspection requests for the next day or a future date. Identify the methods.											

County of El Dorado - Planning, Permitting and Parcel Management
System Functional Requirements

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Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Configurable	Standard - Next	Report Writer	3rd-Party Application	Custom Modification	Not Available	Comments or Answers
Plan Check		PLAN CHECK								
Plan Check	11.000	General								
Plan Check	11.001	ELECTRONIC PLAN REVIEW - Capable of receiving plans electronically with application submission.								
Plan Check	11.002	ELECTRONIC PLAN REVIEW - Capable of online plan review with ability to markup plans and add comments.								
Plan Check	11.003	ELECTRONIC PLAN REVIEW - Capable of returning marked up plans electronically to the customer.								
Plan Check	11.004	ELECTRONIC PLAN REVIEW - Must maintain version control of all documents throughout the entire review process.								

Plan Check	11.005	STANDARD COMMENTS - Allow for user-defined table of standard comments that can be accessed and inserted during plan review.												
Plan Check	11.006	COMMENTS - Reviewers can pin-point comments on the plans at a specific desired location.												
Plan Check	11.007	COMMENTS - Ability to export comments into a formatted template or user-defined document.												
Plan Check	11.008	CORRECTIONS - Before and after corrections are easily identified with callouts, color and bubble marks.												
Plan Check	11.009	CORRECTION NOTICE COMMENTS - Ability to combine all plan review comments and correction requirements into a single correction notice.												
Plan Check	11.010	COMMENTS & ATTACHMENTS - Ability to enter plan check comments and attachments directly into building permit software.												
Plan Check	11.011	EDITABLE COMMENT REVIEW LETTERS - Ability to create editable comment/review letters segregated by department review comments.												
Plan Check	11.012	COMBINED COMMENT LETTERS - Ability to combine department comment letters with permit or other documents.												
Plan Check	11.013	MODIFICATION - Original plan submission files cannot be edited or modified.												
Plan Check	11.014	MODIFICATION - Ability to scale and orient any file format for overlay and comparison with any other file format and save the image to the overlay.												
Plan Check	11.015	COPYRIGHT - Copyright markings on original files from applicants are retained and kept visible on all copies generated by the system.												
Plan Check	11.016	TOOLS - Allow plan reviewers to use templates or engineering quality tools including scale calibrations.												
Plan Check	11.017	WORKFLOW - Processing includes sequential and parallel steps.												
Plan Check	11.018	WORKFLOW - System can handle simultaneous and independent plan reviews.												

Plan Check	11.019	WORKFLOW - Incomplete tasks can be re-routed to secondary staff if primary staff is out or does not respond in a pre-defined period of time.																	
Plan Check	11.020	WORKFLOW - If user is in two roles or levels in the approval process they only need to approve once.																	
Plan Check	11.021	ASSIGNMENT - Plan checkers can be assigned automatically, as well as, manually.																	
Plan Check	11.022	ASSIGNMENT - Work can be assigned to a team of plan checkers while tracking work and progress by individual.																	
Plan Check	11.023	ASSIGNMENT - Work components can be assigned to external entities (e.g., other departments).																	
Plan Check	11.024	ASSIGNMENT - Project manager can be assigned automatically or manually to the plans.																	
Plan Check	11.025	RULES - Business rules can be assigned, as well, as ad hoc.																	
Plan Check	11.026	RULES - Dependencies in tasks can be identified based on business rules.																	
Plan Check	11.027	RULES - Branching and decision logic is based on the data involved and on the user performing the action.																	
Plan Check	11.028	NOTIFICATION - Event driven notification of process events, including e-mail and/or other web-based notification.																	
Plan Check	11.029	NOTIFICATION - Field driven notification of process events, including e-mail and/or other web-based notification.																	
Plan Check	11.030	NOTIFICATION - Ability to send automated notifications to other departments and applicants simultaneously.																	
Plan Check	11.031	VIEWS - Multiple plans, documents and file formats can be viewed at the same time.																	
Plan Check	11.032	VIEWS - Ability to view alternate layers, versions and history during plan check.																	
Plan Check	11.033	STAMPS - Approval stamps can be applied on single pages and in bulk for a specified range of pages.																	

Plan Check	11.034	STAMPS - Approval stamp(s) must be secure and NOT able to be copied.											
Plan Check	11.035	STAMPS - Approval stamp(s) must be customizable for each department.											
Plan Check	11.036	TRACKING - Ability to track plan review cycle times.											
Plan Check	11.037	TRACKING - Ability to track number of plan cycles.											
Plan Check	11.038	TRACKING - Ability to track date when applicants are notified of status updates.											
Plan Check	11.039	TRACKING - Ability to track different versions of the same edited plan.											
Plan Check	11.040	CHECKLIST - Ability to create ad-hoc plan check checklist tasks.											
Plan Check	11.041	CHECKLIST - Ability to generate standardized checklists based on various criteria.											
Plan Check	11.042	META-DATA - Ability to sort drawing sheets by meta-data such as drawing type (e.g., architectural, engineering, etc.).											
Plan Check	11.043	META-DATA - Ability to generate reports/searches/queries using meta-data.											
Plan Check	11.044	CONDITIONS OF APPROVAL - Ability to apply project-specific conditions of approval to each address, property, parcel, situs, etc. within that project.											
Plan Check	11.045	CONDITIONS OF APPROVAL - Allow conditions of approval to be entered and maintained by multiple departments.											
Plan Check	11.046	HISTORY - Ability to show all permit history by address when entering application information.											
Plan Check		RESPONSE REQUIRED - use additional pages as necessary											
Plan Check	11.047	ELECTRONIC PLAN REVIEW - Describe how the document change control process is managed.											
Plan Check	11.048	WORKFLOW - At what levels can workflow rules be set (e.g., role, position, department)?											
Plan Check	11.049	WORKFLOW - If multiple agency approvals are needed how is this accomplished?											

Plan Check	11.050	WORKFLOW - How are partial approvals handled to allow some workflow to continue (e.g., issuance of foundation permit)?									
Plan Check	11.051	STAMPS - How are professional and County stamps applied?									
Plan Check	11.052	PARENT/CHILD - Supports parent/child relations for projects and sub-projects. List any limitations.									
Plan Check	11.053	META-DATA - What meta-data elements are captured?									
Plan Check	11.054	CONDITIONS OF APPROVAL - Describe how the various conditions of approval and mitigation measures are managed.									
Plan Check	11.055	TECHNOLOGY - What technology is available to ensure the hardcopy construction documents are the latest agency approved version?									
Plan Check	11.056	MASTER PLANS - How are master plans processed?									
Plan Check	11.057	CALCULATIONS - How to manage square footage calculations for occupancy, uses, coverage, TRPA regulations, etc.?									

**County of El Dorado - Planning, Permitting and Parcel Management System
Functional Requirements**

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Integration - Interface	12.000	Integration - Interface - Conversion								
Integration - Interface	12.001	STATE LICENSES BOARD - Integrate permit application with the California Contractors State License Board and populate fields in permit module (e.g. contractor licenses, license status, insurance, bond, etc.).								
Integration - Interface	12.002	STATE ENGINEERS BOARD - Integrate permit application with the California Professional Engineers Board and populate fields in permit module (e.g. licenses, license status, insurance, etc.).								
Integration - Interface	12.003	STATE LAND SURVEYORS BOARD - Integrate permit application with the California Land Surveyors Board and populate fields in permit module (e.g. licenses, license status, insurance, etc.).								

Integration - Interface	12.004	STATE ARCHITECTS BOARD - Integrate permit application with the California Architects Board and populate fields in permit module (e.g. licenses, license status, insurance, etc.).										
Integration - Interface	12.005	COUNTY ASSESSORS - Ability to access County Assessor records directly from within the application.										
Integration - Interface	12.006	COUNTY TAX COLLECTOR - Ability to access County Tax Collector records directly from within the application.										
Integration - Interface	12.007	COUNTY SURVEYOR - Ability to access County Surveyor records directly from within the application.										
Integration - Interface	12.008	COUNTY FINANCIAL SYSTEM - Ability to access records directly within the application.										
Integration - Interface	12.009	GENERAL LEDGER - Ability to generate journal entries to the general ledger for any invoices generated and revenues received, including all fees and credits.										
Integration - Interface	12.010	ACCOUNTS RECEIVABLE - Provide for receipt validation of Accounts Receivable accounts.										
Integration - Interface	12.011	ACCOUNTS PAYABLE - Provide integration with accounts payable for deposit account refund payments.										
Integration - Interface	12.012	MICROSOFT OFFICE - Provide integration to Microsoft Office for word processing, spreadsheets, presentations, database management, etc.										
Integration - Interface	12.013	ESRI / ArcGIS 10.1 - Provide integration for situs addresses, parcel information, jurisdictional layers, parcel constraints, parcel base, aerial/imagery and all other existing GIS layers managed by the County Surveyor's Office.										
Integration - Interface	12.014	WEBXTENDER - Ability to convert scanned data.										
Integration - Interface	12.015	GOOGLE - Interface for use of calendars, Gmail and maps.										
Integration - Interface	12.016	ENVISION - Interface for septic and sewer data.										

Integration - Interface	12.017	LEGISTAR - Interface for Board and Planning Commission calendars and agendas.									
Integration - Interface	12.018	CREDIT/DEBIT CARD - Ability to process credit, debit and e-check payments.									
Integration - Interface		RESPONSE REQUIRED - use additional pages as necessary									
Integration - Interface	12.019	ELECTRONIC DOCUMENT MANAGEMENT SYSTEM - Identify which Electronic Document Management System is used.									
Integration - Interface	12.020	ELECTRONIC PLAN CHECK SYSTEM - Identify which Electronic Plan Check System is used.									
Integration - Interface	12.021	IVR - Ability to integrate with an interactive voice response system for inspection scheduling, status updates, and payments, at a minimum. Please list IVR partners.									

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GIS	13.000	GIS INTEGRATION								
GIS	13.001	INTERFACE - Interface to GIS mapping products that support ESRI formats.								
GIS	13.002	INTERFACE - Ability to find any parcel on a map by address or parcel number and drill down to all related information, flags, permits, documents, photos, conditions, GIS layers, etc.								
GIS	13.003	INFORMATION FROM MAP - Ability to select a parcel or group of parcels from a GIS map and drill-down to detailed information.								
GIS	13.004	INFORMATION FROM TABLE - Ability to select a parcel or group of parcels from a GIS map and display data in a table format.								
GIS	13.005	VIEW MASTER RECORD LOCATION INFORMATION ON MAP - Ability to view a map by location for a planning project, permit, inspection, code enforcement case, etc..								

GIS	13.006	VIEWING ACTIVITY ON MAP - Provide the ability to display locations on an interactive map by activity type/status (e.g., permits by status [open/closed, type], planning project, code cases [open/closed, type], etc.).											
GIS	13.007	BUFFERING - Ability to select based on a buffer feature on the map.											
GIS	13.008	LOCATION SEARCHES - Ability to search for locations by anything on the map: an address, a location, a name, an intersection, a customer account number, parcel number, etc.											
GIS	13.009	QUERYING DATABASE ATTRIBUTES - Provides ability to generate user-defined maps showing any queried parcel attributes.											
GIS	13.010	BI-DIRECTIONAL INTERFACING - Interface between GIS and other vendor modules should be bi-directional.											
GIS	13.011	BI-DIRECTIONAL INTERFACING - The ability to query, view, and interact with location data with a spatial location and display them in a GIS viewer.											
GIS	13.012	GIS DATA SYNCHRONIZATION - Provides ability to synchronize any changes from GIS to update related parcel/location data.											
GIS	13.013	PROPERTY DESIGNATIONS - Ability to manage unlimited property designations and restrictions.											
GIS	13.014	ZONING INFORMATION - Provide for the inclusion of multiple pieces of zoning information by parcel.											
GIS	13.015	GENERAL PLAN INFORMATION - Ability to include multiple land use and overlay designations per parcel.											
GIS	13.016	COORDINATES - Ability to associate latitude and longitude to a project, location, point, line, etc.											
GIS	13.017	COORDINATES - Must be able to interpret latitude and longitude to local state plan coordinates.											
GIS	13.018	INQUIRY - Provide the capability to query acreage, parcel numbers, project/case numbers, etc., for specific geographic areas.											
GIS	13.019	GIS MAP INQUIRY - Ability to plot geographic planning on the map including all associated parcels.											
	13.020	META-DATA - Ability to generate reports using meta-data.											

GIS		RESPONSE REQUIRED - use additional pages as necessary									
GIS	13.021	META-DATA - What meta-data elements are captured?									
GIS	13.022	POSITIONING COORDINATES - How does the system use GPS coordinates?									
GIS	13.023	DISPLAY MAP - How flexible is the symbology?									
GIS	13.024	BUFFERING - How do the results of buffering and searching initiate a workflow?									
GIS	13.025	BUFFERING - How can the results of buffering be used?									

**County of El Dorado - Planning, Permitting and Parcel Management System
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Security	14.000	SECURITY								
Security	14.001	PERSON/ENTITY - Ability to maintain central person/entity record identification information throughout all modules.								
Security	14.002	SINGLE SIGN-ON - ACTIVE DIRECTORY - Support of Single Sign-on and Active Directory.								
Security	14.003	SECURITY ACCESS AUDIT TRAIL - Maintain the date of last password change for each user.								
Security	14.004	PASSWORD RECOVERY - Provide users self-password recovery capability.								
Security	14.005	PASSWORD ENCRYPTION - Provide password encryption.								
Security	14.006	RESTRICT SECURITY ACCESS OF SELECTED TRANSACTIONS - Restrict entry of certain transactions by user ID.								
Security	14.007	CREATE SECURITY PROFILE BY COPYING EXISTING PROFILE - Allow creation of new user rights by copying another user's right levels with the ability to modify the rights.								

Security	14.008	SECURITY ACCESS CONTROL - Assign view only access to specific user profiles.																	
Security	14.009	SECURITY ACCESS CONTROL - Restrict view to confidential information but provide full add/change/delete capabilities to other information by user profile.																	
Security	14.010	SECURITY ACCESS - Ability to update and inquire within the program into any record, provided user has the proper authorization.																	
Security	14.011	SENSITIVE INFORMATION - System will mask user identified sensitive information.																	
Security		SECURITY ACCESS - Able to provide security at the following levels:																	
Security	14.012	Enterprise																	
Security	14.013	Department/Agency																	
Security	14.014	Division																	
Security	14.015	Role/Position																	
Security	14.016	User																	
Security		SECURITY ACCESS - Security settings can be set for:																	
Security	14.017	Global																	
Security	14.018	Module																	
Security	14.019	Screen and menu																	
Security	14.020	Report																	
Security	14.021	Record																	
Security	14.022	Field																	
Security		ACCESS - System administrator can set a user security profile to define a user's authorization to:																	
Security	14.023	Log on																	
Security	14.024	Add data																	
Security	14.025	Delete data																	
Security	14.026	Change data																	
Security	14.027	View data																	
Security	14.028	AUDIT - Audit trail of all changes to file (changed from, date/time stamp, user that changed record).																	
Security	14.029	RECORD RETENTION - Ability to allow the County to define record retention periods, specific to individual record categories.																	

Security	14.030	ENCRYPTION - All data is encrypted when accessed via the Internet or Intranet.								
Security	14.031	AUTO-SAVE - System auto saves reviewed and marked up documents.								
Security	14.032	TIME-OUT - System disconnects or locks out user session during designated periods of inactivity.								
Security		RESPONSE REQUIRED - use additional pages as necessary								
Security	14.033	GENERAL SECURITY FEATURES - How is data integrity maintained?								